

# 2011 Annual Summary

Subdivision, Land Development and Zoning Activity



Montgomery County, Pennsylvania



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# 2011 Annual Summary

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This report summarizes the subdivision, land development, and zoning proposals received by the Montgomery County Planning Commission in 2011. The proposals were reviewed under the requirements of the Pennsylvania Municipalities Planning Code (Act 247).

The information and statistics in this report reflect proposals and approved plans only - not actual construction activity. Information on construction activity is available from municipal building inspectors and zoning officers as well as the Montgomery County Board of Assessment Appeals. Subdivision activity is recorded on tax maps, which are available for viewing in the Montgomery County Board of Assessment Appeals map room. Property records from the county are also available online at [propertyrecords.montcopa.org](http://propertyrecords.montcopa.org). The Planning Commission also publishes two annual reports covering residential and nonresidential construction activity for the previous year. These reports are usually published in early summer.

Proposed plans are preliminary plans under consideration for municipal approval. Proposed plan characteristics discussed in this report include residential acreage and unit number and type, nonresidential acreage and square footage and a brief discussion of zoning text and map amendments submitted for review.

This report also includes information on approved plans (by the municipality) that have been submitted to the county for final plan recording. Information from approved plans is presented for the number of development proposals, the number of residential units, and the amount of nonresidential square footage. It should be noted that these approved plans were not necessarily submitted in 2011. In fact, many had been submitted in previous years and were under review by local municipalities. Once plans are approved, applicants require building permits and other necessary permits before construction begins.

The report also contains a brief summary of zoning amendments. Special requests for review (such as conditional uses) are not included.

This report can be used to indicate areas of the county that may experience development in the future. Ten-year summaries are included to provide a historical perspective.

Beginning in 2004, the Annual Summary includes analysis of land development with regard to the *County Comprehensive Plan*. The location, type, and intensity of development has been compared to county plan goals in each applicable section of this report.

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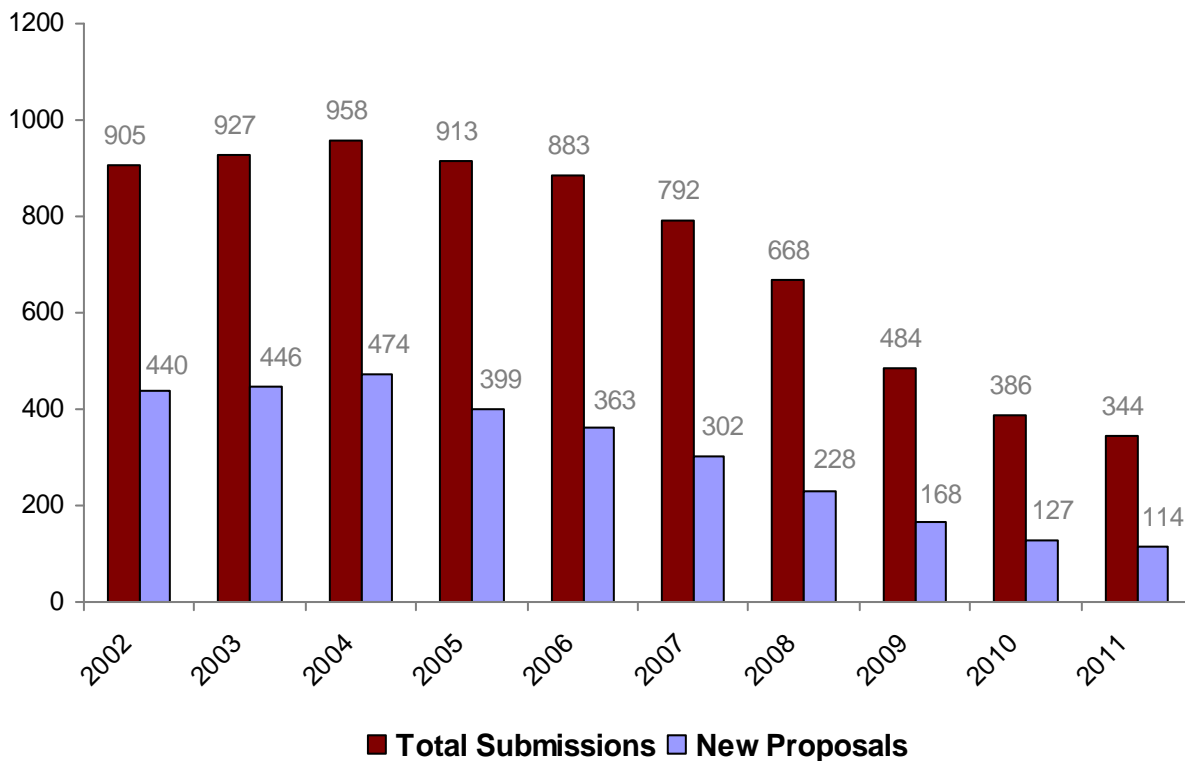
## Section One

### Number of Submissions

In 2011 the Planning Commission received 344 applications for subdivision, land development, and zoning ordinance and map amendments. This was 11% less than in 2010. The total number of submissions has decreased each of the last seven years, dropping 64% from 2004 to 2011. This is the lowest it has been since at least 1970, when comparable county records began being recorded.

A development proposal can undergo many revised submissions before it is either approved, not approved, or withdrawn by the applicant. The 2011 submissions include 114 new proposals for land developments or subdivisions that had not been previously submitted with similar land use and density components.

**Total Annual Submissions, 2002 to 2011**





**Section One: Number of Submissions**

**Montgomery County Submissions by Municipality, 2011**

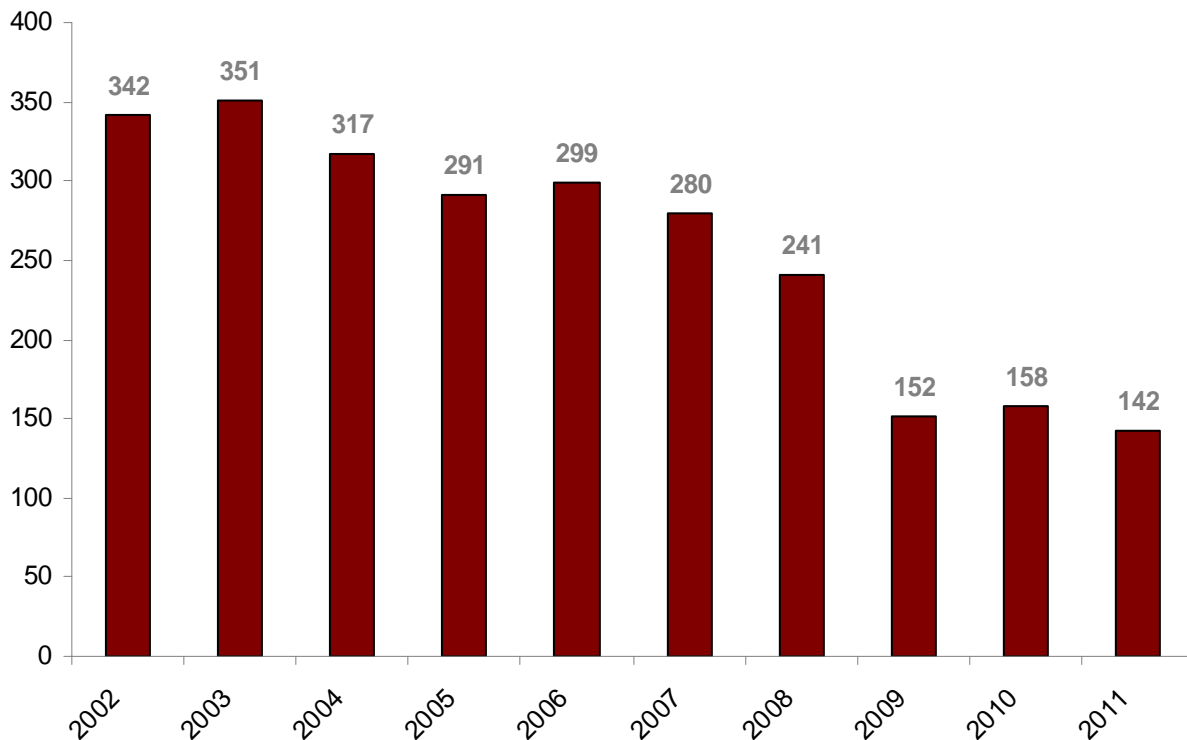
Municipality	Total	Land Developments	Subdivisions	Municipality	Total	Land Developments	Subdivisions
Abington	7	4	3	North Wales	2	0	0
Ambler	2	2	0	Pennsburg	1	0	0
Bridgeport	1	1	0	Perkiomen	1	0	1
Bryn Athyn	0	0	0	Plymouth	9	3	1
Cheltenham	5	3	0	Pottstown	2	1	0
Collegeville	1	0	0	Red Hill	2	1	0
Conshohocken	6	6	2	Rockledge	0	0	0
Douglass	7	1	5	Royersford	3	1	0
East Greenville	5	2	2	Salford	1	1	0
East Norriton	2	0	0	Schwenksville	0	0	0
Franconia	2	0	1	Skippack	4	3	2
Green Lane	1	0	0	Souderton	4	2	3
Hatboro	6	5	0	Springfield	5	2	0
Hatfield Borough	1	0	0	Telford	1	0	0
Hatfield Township	6	3	1	Towamencin	10	4	0
Horsham	11	3	2	Trappe	0	0	0
Jenkintown	1	0	0	Upper Dublin	20	3	5
Lansdale	5	1	3	Upper Frederick	5	2	0
Limerick	19	6	3	Upper Gwynedd	7	4	3
Lower Frederick	2	0	1	Upper Hanover	2	0	1
Lower Gwynedd	9	2	1	Upper Merion	5	4	0
Lower Merion	32	13	7	Upper Moreland	14	6	1
Lower Moreland	11	3	3	Upper Pottsgrove	2	0	0
Lower Pottsgrove	7	7	1	Upper Providence	15	7	3
Lower Providence	13	3	2	Upper Salford	3	2	1
Lower Salford	9	2	3	West Conshohocken	2	1	1
Marlborough	3	0	0	West Norriton	0	0	0
Montgomery	7	3	0	West Pottsgrove	1	0	0
Narberth	0	0	0	Whitemarsh	12	6	3
New Hanover	7	2	5	Whitpain	9	3	4
Norristown	2	0	0	Worcester	10	3	4
<b>Totals</b>	<b>342</b>	<b>131</b>	<b>78</b>				

Note: Municipal totals include zoning-related submissions and special reviews. County total does not include two additional reviews for the Phoenixville (Chester County) and Bucks County Comprehensive Plans.

**Approved Plans**

In 2011, 142 plans were approved by their respective municipalities and recorded as a final plan. This was less than the year before (158), and it amounts to the lowest total of approved plans since approvals were recorded beginning in 1990, an indication of the general slowing of development activity in the county. There are still plans in the pipeline that could ultimately gain approval, but until proposals are submitted more frequently, it will be unlikely that approvals make much of a comeback.

**Total Plans Approved, 2002 to 2011**



**Conclusion**

After reaching a ten-year high in 2004, the number of submissions to the Planning Commission has declined each year, but it reached a historical low point by dropping another 11 percent to less than 350 submissions in 2011. From 2002 to 2007, the average number of submissions each year was almost 900. The deepening declines in the last four years are the result of a staggering economy marked by high unemployment and severely tightened financial constrictions from creditors. Some prior plans, even if approved, lay dormant due to a weak sales market, developers not being able to get necessary credit from lending institutions, or having their own financial issues. However, there are some indications that we may have reached the bottom and could see moderate gains in future years. The remainder of this report will elaborate on the type, location, and intensity of land development proposals in the county with comparisons to ten-year trends. Also included is an analysis with regard to the *County Comprehensive Plan* goals and policies.

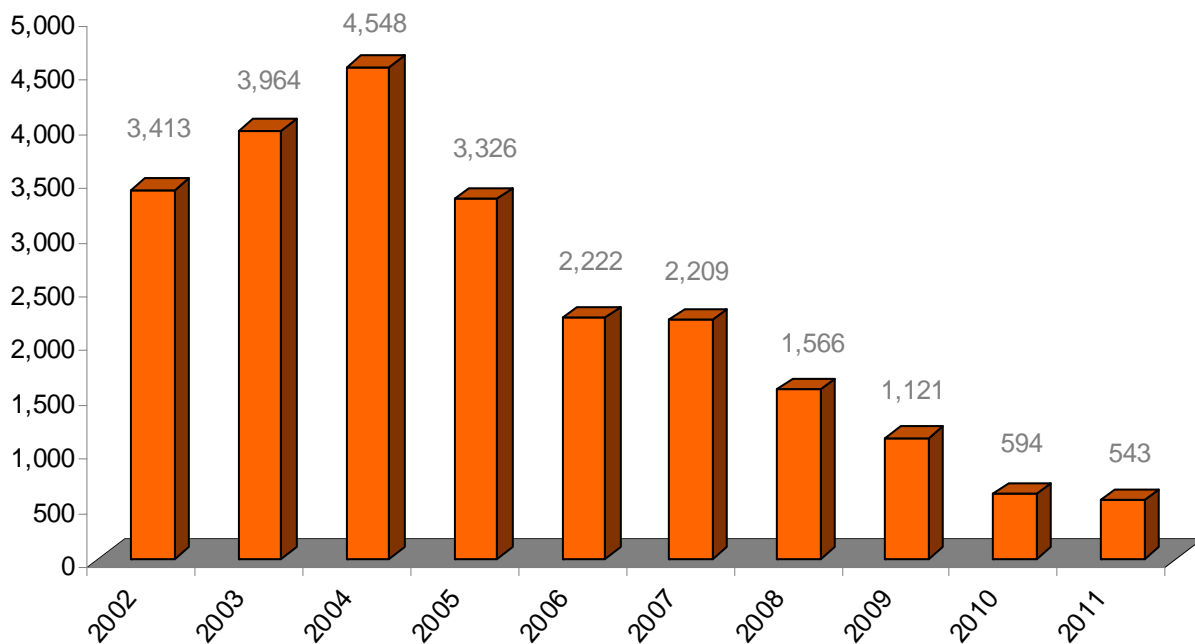
## Section Two

### Acres of Submissions

#### Countywide Acres Proposed for Development

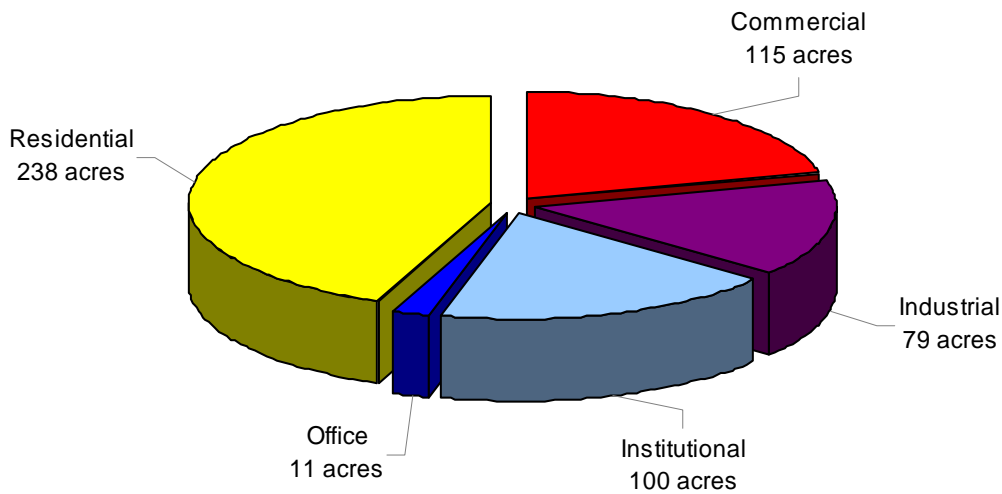
The total amount of land proposed for development in 2011, which excludes land set aside for municipal use, open space, agricultural lands, recreation areas, residential country estates, transportation or utilities, was 543 acres. This represents a decrease of almost 9% from 2010 to 2011, and it is the seventh consecutive year that acreage proposed for development has fallen. It is also the lowest annual total since at least 1970 when comparable county records began being recorded.

#### Acres Proposed for Development, 2002 to 2011



The chart below shows the breakdown of acreage proposed for development by land use type. Land proposed for residential use is typically the largest land consumer, and that pattern held true to form in 2011 with 44% of acreage proposed going toward residential uses. Commercial and Institutional uses were next with 21% and 18% of the total acreage proposed for development, respectively.

**Acres Proposed for Development by Type, 2011**



The amount of land proposed in 2011 for residential use, 238 acres, was up from 2010’s record low, but still ranks as the 2nd lowest total since 1970 when comparable county records began being recorded. Proposed residential acreage used to consume several thousand acres per year. The slump in housing proposals over the last four years has a lot to do with the reduction in acreage consumed, but another important cause is the decline in single family detached housing proposals (see section 3). Detached homes normally consume the most acres per unit of all housing types.

Total nonresidential acreage has been greater than residential acreage in each of the last six years, although this has not always been the case as the frequency of specific types of development are generally cyclical based on the current market at the time for various sectors.

**Acres Proposed for Development by Municipality**

The table on the opposite page shows the dispersal of proposed acres throughout the county. In 2011, Douglass Township led the county with 68 acres proposed for development, most of that total going towards single family detached housing projects. Other leading municipalities included Whippain, Lower Merion, Lower Pottsgrove, and Limerick Townships.

**Section Two : Acreage of Submissions**

**Montgomery County Acres Proposed For Development by Municipality, 2011**

Municipality	Total	Nonresidential	Residential
Abington	9	0	9
Ambler	4	4	0
Bridgeport	1	0	1
Bryn Athyn	0	0	0
Cheltenham	15	15	0
Collegeville	0	0	0
Conshohocken	4	2	2
Douglass	68	6	62
East Greenville	1	0	1
East Norriton	0	0	0
Franconia	0	0	0
Green Lane	0	0	0
Hatboro	8	3	6
Hatfield Borough	0	0	0
Hatfield Township	18	16	2
Horsham	14	14	0
Jenkintown	0	0	0
Lansdale	0	0	0
Limerick	30	24	5
Lower Frederick	0	0	0
Lower Gwynedd	9	108	1
Lower Merion	35	2	33
Lower Moreland	9	8	1
Lower Pottsgrove	32	30	1
Lower Providence	11	3	8
Lower Salford	14	12	2
Marlborough	0	0	0
Montgomery	27	15	12
Narberth	0	0	0
New Hanover	20	14	6
Norristown	0	0	0

Municipality	Total	Nonresidential	Residential
North Wales	0	0	0
Pennsburg	0	0	0
Perkiomen	0	0	0
Plymouth	17	13	4
Pottstown	0	0	0
Red Hill	0	0	0
Rockledge	0	0	0
Royersford	1	1	0
Salford	3	3	0
Schwenksville	0	0	0
Skippack	18	18	0
Souderton	16	15	1
Springfield	0	0	0
Telford	0	0	0
Towamencin	16	16	0
Trappe	0	0	0
Upper Dublin	13	7	6
Upper Frederick	21	21	0
Upper Gwynedd	14	3	11
Upper Hanover	2	0	2
Upper Merion	17	17	0
Upper Moreland	5	5	0
Upper Pottsgrove	0	0	0
Upper Providence	10	7	3
Upper Salford	1	0	1
West Conshohocken	1	0	1
West Norriton	0	0	0
West Pottsgrove	0	0	0
Whitemarsh	8	0	8
Whitpain	39	1	38
Worcester	11	0	11
<b>Totals</b>	<b>543</b>	<b>305</b>	<b>238</b>

Note: Figures include age restricted development and exclude agricultural, residential country estates, municipal, open space, recreation, transportation and utility acreage. They have also been rounded to the nearest whole acre.

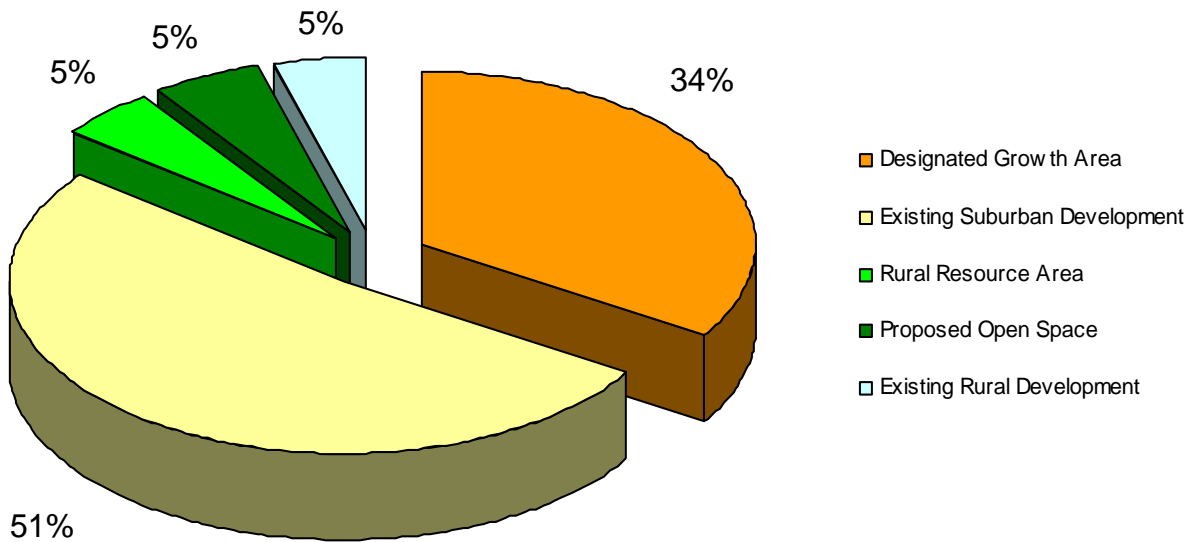
**Acreage Proposed for Development on Previously Developed Sites**

In 2000, the Planning Commission began tracking proposed subdivisions and land developments with regard to the amount of existing developed land already on the proposed site. A record is kept of the approximate percentage of a site proposed for development that already has a structure, parking lot, or some other form of man-made feature. In 2011, the Planning Commission estimates that approximately 43% of the acres proposed for development had some such feature on it. This rate is consistent with the last few years and is indicative of a trend toward residential, commercial, and industrial infill development, rather than toward developing tracts of previously undisturbed open space.

**County Growth and Preservation Plan**

One of the main components of the County Comprehensive Plan, the *County Growth and Preservation Plan*, recommends most new development occur in existing developed areas or designated growth areas, with only very low intensity development in rural areas. Subdivision and land development proposals were mapped and evaluated with regard to the *County Growth and Preservation Plan*. This analysis shows that 90% of the acres proposed for development were located in existing developed or designated growth areas, a figure higher than the average of 80% for the years 2005 through 2011.

**Location of 2011 Proposed Acreage Relative to the *County Growth and Preservation Plan***

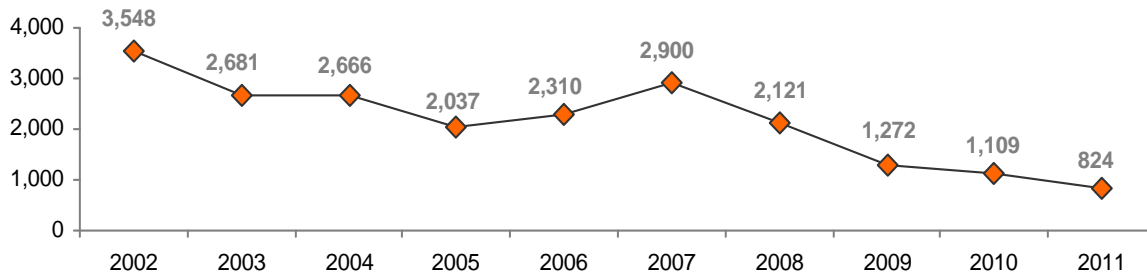




**Acres of Land Approved for Development**

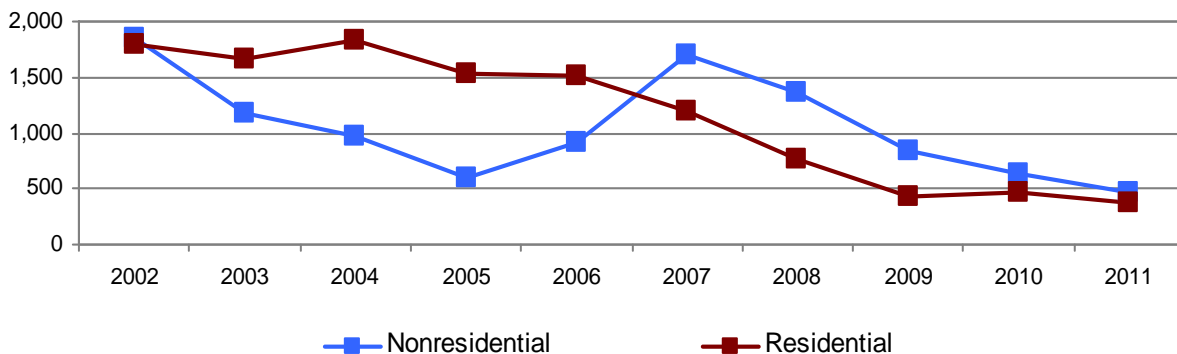
In this section, the total amount of land approved for development excludes land set aside for municipal use, open space, agricultural lands, recreation areas, residential country estates or utilities. In 2011, there were 824 acres approved for development. This was a 26% decrease from the 2010 total of 1,109 approved acres.

**Approved Total Acreage, 2002-2011**



The trend for the past five years has been for nonresidential proposals to consume more land than residential proposals. Before this period, it was residential uses that dominated the acreage comparison. In 2011, both types of uses were well below average. While the 459 approved acres for nonresidential uses was below the ten year average of 1,051 acres, the residential total of 365 acres paled even further from its ten year average of 1,157 acres.

**Acreage Approved for Development by Type, 2002 - 2011**

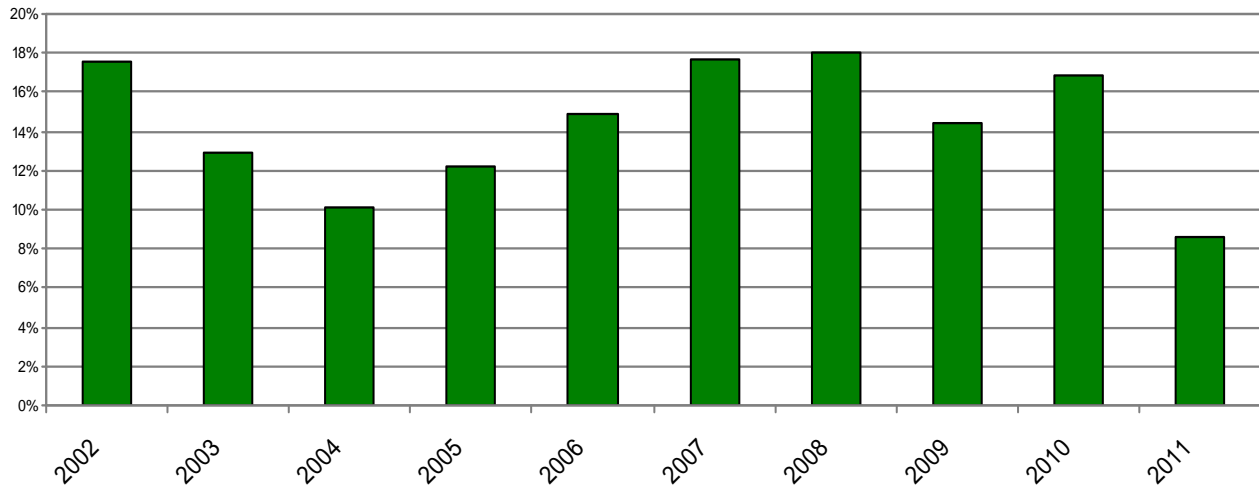


**Acres of Land Approved as Private or Public Open Space**

In 2011, only 71 acres of open space were included in approved plans. This figure represents land that was set aside as privately or publicly owned land restricted from further development. It includes public and private parks, central green areas, commonly owned stormwater detention facilities, and natural areas including wetlands and floodplains. Acres that were approved as open space through subdivision and land development plans were dedicated to both public and private ownership. It should be noted that this analysis does not account for every acre preserved as open space in the county. Absent from this analysis are fee simple purchases of properties that do not involve subdivisions or land development, unlotted open space on condominium developments, and purchases of development rights through the Montgomery County Agricultural Preservation Program.

The total acreage set aside as open space in plans approved in 2011 was historically low, just like the amount of acres approved for development, but it was also the lowest as a percentage of what was approved since at least 1995, when comparable records began being recorded. With fewer medium-to-large scale subdivisions and developments, there has not been as much land being specifically set aside or deed-restricted as open space.

**Open Space as a Percentage of Acres Approved for Development, 2002 to 2011**



**Conclusion**

The amount of acreage proposed or approved for development in 2011 decreased from 2010 totals. Proposals in terms of acreage have been declining every year since 2004 and are at their lowest point since records began in 1970. Approvals have declined for four years now, but at a less dramatic rate, suggesting that older proposals may be taking longer to reach final approval thus providing some land development activity despite the lack of new recent proposals.

## Section Three

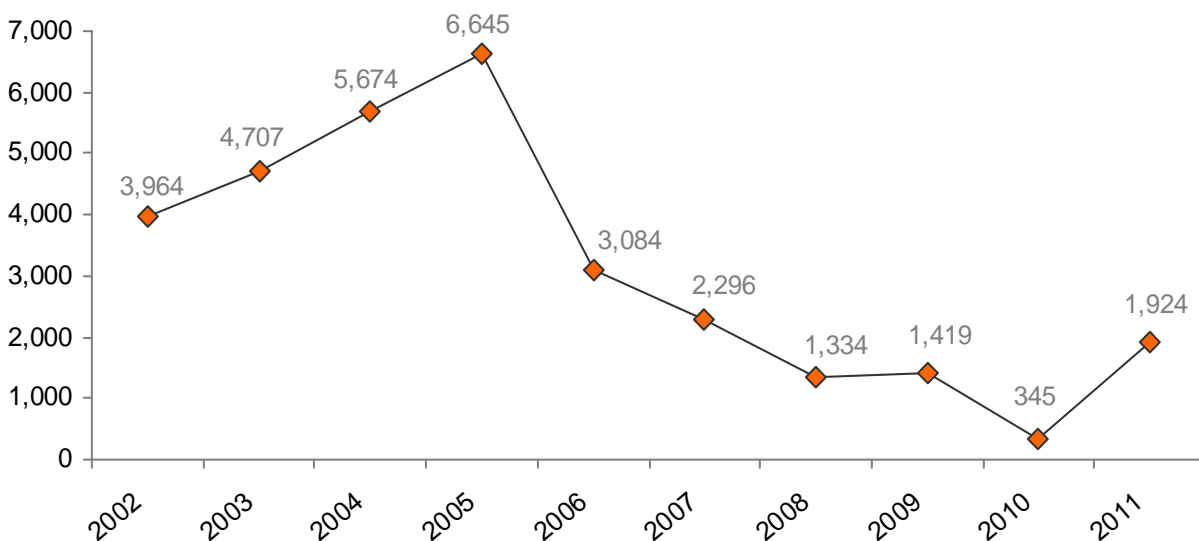
### Residential Submissions

#### Proposed Residential Development

The total number of proposed residential units experienced a substantial gain in 2011. There were 1,924 units proposed in 2011, over five times the record low of 345 units in 2010. Last year's total was also higher than the annual figures for 2008 and 2009, but to put the numbers in context, the median was 3,290 units during the 1990's and 4,169 units during the 2000's. This activity still leaves the county in one of the worst housing slumps since at least 1970, but it offers hope that conditions may be getting better for a gradual recovery.

The first half of the decade showed very strong residential activity, peaking in 2005 with over 6,600 units proposed, but that activity has dropped over the second half of the decade due to a downturn in the economy, corrections in an exaggerated housing market, and problems with lending institutions that have resulted in tightening credit and an increase in foreclosures.

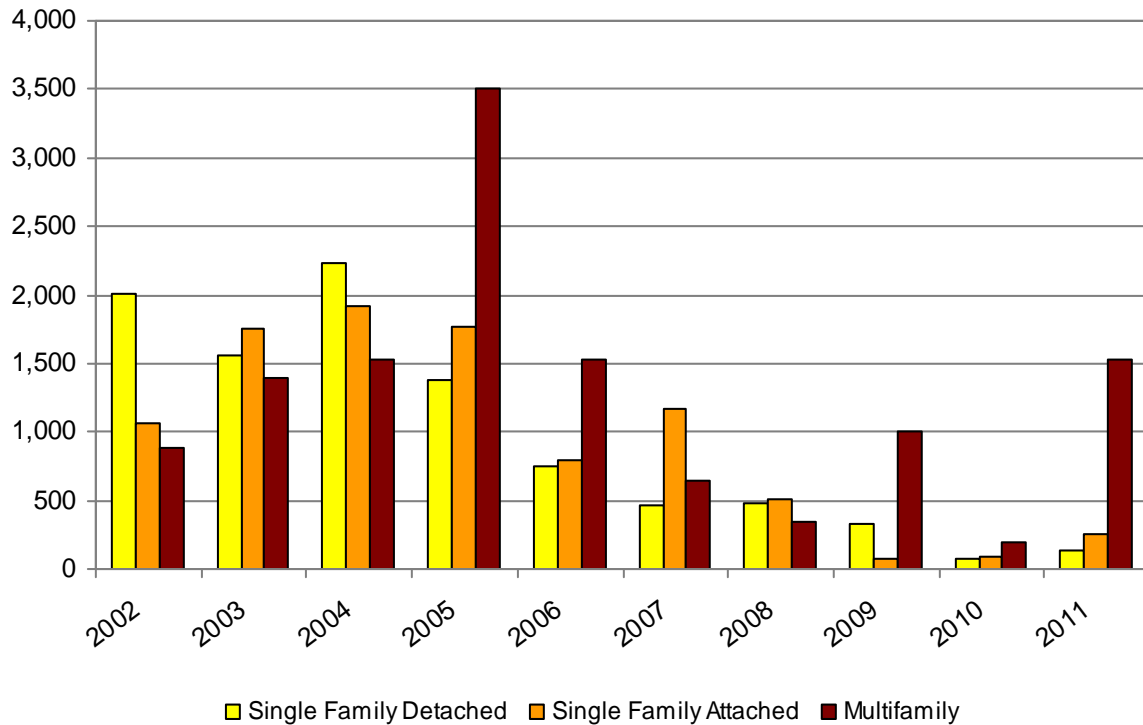
**Proposed Residential Units, 2002 - 2011**



**Residential Proposals by Type**

In 2011, it is clear that the robust increase in housing proposals was driven by multifamily housing types. This continues a shift that began in 2005 toward fewer single family detached units and a greater emphasis on denser housing types. Multifamily and single family attached units comprised 93% of all proposed units in the county for 2011. Overall, each housing type increased over the previous year, but single family detached and attached homes were still well below totals achieved earlier in the decade. It should be noted that dramatic swings from one year to the next are not unusual, especially in a period of low activity when a couple of major developments can really affect the annual comparisons.

**Proposed Residential Units by Type, 2002 - 2011**



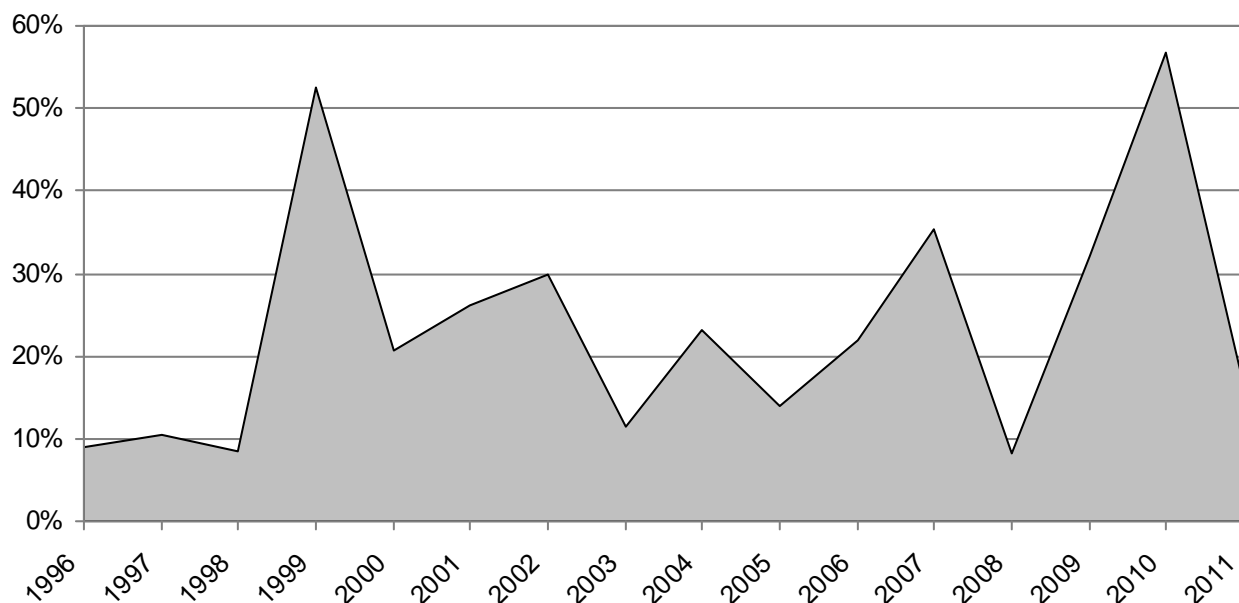
**Proposed Development of Residential Housing Units, 2010 - 2011**

Housing Type	2011	2010	Change
Single Family Detached	141	70	101%
Single Family Attached	249	84	196%
Multifamily	1,534	191	703%

**Age-Restricted Housing Development**

There were 316 age-restricted units proposed in 2011, and all of them were multifamily or single family attached units. This represents a higher total of age-restricted units proposed compared to 2010 (196 units), but as a percentage of total units proposed, age-restricted units accounted for only 16% of all units. Since 1996, the median percentage has been around 21%. As with all housing types, the county saw larger numbers of age-restricted units earlier in the last decade, but it will be interesting to see how popular age-restricted housing becomes as the county’s population continues to get older.

**Proposed Age-Restricted Housing as a Percentage of Total Housing Units, 1996-2011**

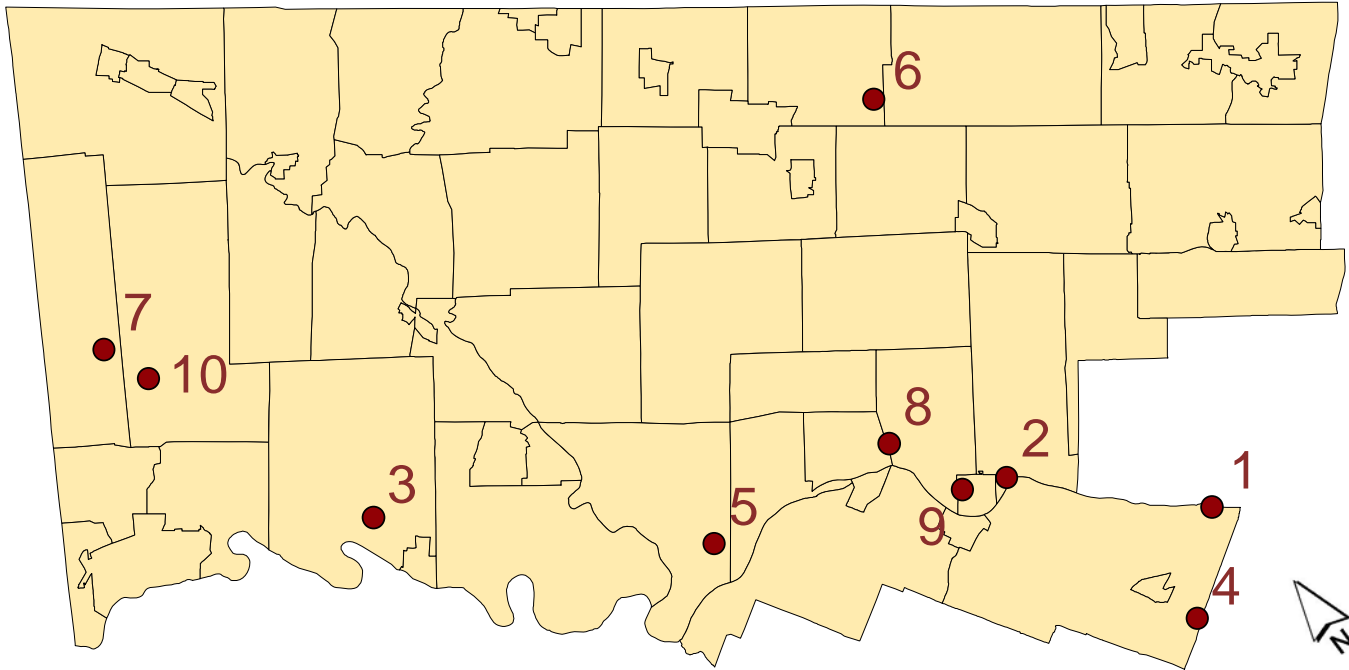


**Largest Residential Proposals**

The list of the largest residential proposals on the following page reflects why multifamily housing types had a strong presence in residential activity for 2011. The top five proposals were all multifamily developments and seven out of the ten were multifamily. Only one of the proposals was for single-family detached residential developments.

The two largest proposals featured high-density multiple building apartment/condominium units along the Schuylkill River waterfront with unique transportation tie-ins. The former Georgia Pacific site, 600 Righters Ferry in Lower Merion Township, is proposed to include 580 units situated in five buildings along a former industrial tract with a close proximity to Philadelphia, the Schuylkill Expressway, and even a bridge that could offer direct access into Manayunk. The Courts at Spring Mill in Whitemarsh is another former industrial site that is proposed to feature 385 units in two buildings directly across from the Spring Mill Station along SEPTA’s Norristown Regional Rail Line.

**Location of Top Ten Largest Residential Proposals, 2011**



**Montgomery County Largest Residential Proposals, 2011**

	<b>Development Name</b>	<b>Units</b>	<b>Type</b>	<b>Municipality</b>
1.	600 Righters Ferry Road - Georgia Pacific Site	580	MF	Lower Merion
2.	The Courts at Spring Mill	385	MF	Whitemarsh
3.	Lewis Square	234	MF (age-restricted)	Limerick
4.	Palmer Seminary Site	132	MF	Lower Merion
5.	950 Rittenhouse Road Redevelopment	84	MF	Lower Providence
6.	The Enclave at Montgomery - Montgomery Walk - Phases IIB & IIC	81	SFA (age-restricted)	Montgomery
7.	Berwind II	71	SFD	Douglass
8.	Plymouthtowne Apartments	70	MF	Plymouth
9.	Parkview Terrace	48	MF	Conshohocken
10.	McGee Tract	39	SFA	New Hanover

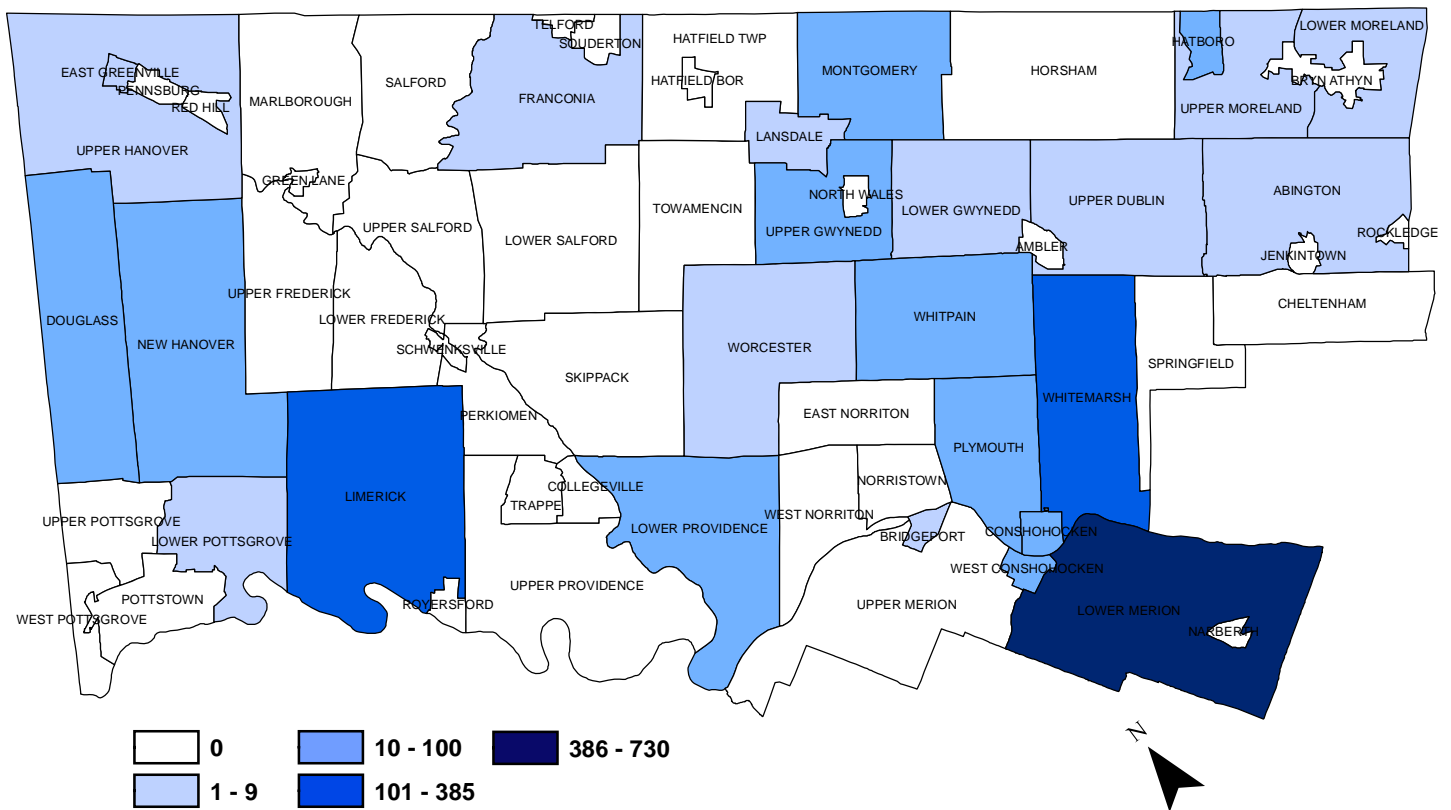
**Residential Units Proposed for Development by Municipality**

The table on the following page lists proposed residential unit totals by type for each municipality. Lower Merion, Whitmarsh, and Limerick Township received the most residential activity and were the only municipalities to go over 100 units proposed.

Geographically, the countywide map below does not indicate any broad trends, but it is noticeable that eastern and central municipalities were just as likely to receive a good amount of residential activity as the growing municipalities in the western half of the county. Today, redevelopment opportunities and infill development are enticing developers as much as the open greenfields in the county’s outer suburban ring that drove suburban growth over the last half century.

The other noticeable sign from the map is how many municipalities still received no residential proposals in 2011. 37 of the county’s 62 municipalities did not receive a new submission to build any residential units and only 13 received applications totaling more than ten units.

**Proposed Housing Units by Municipality, 2011**



**Section Three: Residential Submissions**

**Montgomery County Proposed Residential Units by Municipality, 2011**

Municipality	Total	Detached	Attached	Multifamily
Abington	2	2	0	0
Ambler	0	0	0	0
Bridgeport	9	0	9	0
Bryn Athyn	0	0	0	0
Cheltenham	0	0	0	0
Collegeville	0	0	0	0
Conshohocken	58	0	10	48
Douglass	87	87	0	0
East Greenville	2	0	2	0
East Norriton	0	0	0	0
Franconia	1	1	0	0
Green Lane	0	0	0	0
Hatboro	22	0	22	0
Hatfield Borough	0	0	0	0
Hatfield Township	0	0	0	0
Horsham	0	0	0	0
Jenkintown	0	0	0	0
Lansdale	3	1	2	0
Limerick	234	0	0	234
Lower Frederick	0	0	0	0
Lower Gwynedd	2	1	0	1
Lower Merion	730	4	14	712
Lower Moreland	1	1	0	0
Lower Pottsgrove	1	1	0	0
Lower Providence	84	0	0	84
Lower Salford	0	0	0	0
Marlborough	0	0	0	0
Montgomery	81	0	81	0
Narberth	0	0	0	0
New Hanover	40	1	39	0
Norristown	0	0	0	0

Municipality	Total	Detached	Attached	Multifamily
North Wales	0	0	0	0
Pennsburg	0	0	0	0
Perkiomen	0	0	0	0
Plymouth	70	0	0	70
Pottstown	0	0	0	0
Red Hill	0	0	0	0
Rockledge	0	0	0	0
Royersford	0	0	0	0
Salford	0	0	0	0
Schwenksville	0	0	0	0
Skippack	0	0	0	0
Souderton	0	0	0	0
Springfield	0	0	0	0
Telford	0	0	0	0
Towamencin	0	0	0	0
Trappe	0	0	0	0
Upper Dublin	1	1	0	0
Upper Frederick	0	0	0	0
Upper Gwynedd	24	4	20	0
Upper Hanover	1	1	0	0
Upper Merion	0	0	0	0
Upper Moreland	1	1	0	0
Upper Pottsgrove	0	0	0	0
Upper Providence	0	0	0	0
Upper Salford	0	0	0	0
West Conshohocken	22	0	22	0
West Norriton	0	0	0	0
West Pottsgrove	0	0	0	0
Whitemarsh	385	0	0	385
Whitpain	60	32	28	0
Worcester	3	3	0	0
<b>Totals</b>	<b>1924</b>	<b>141</b>	<b>249</b>	<b>1534</b>

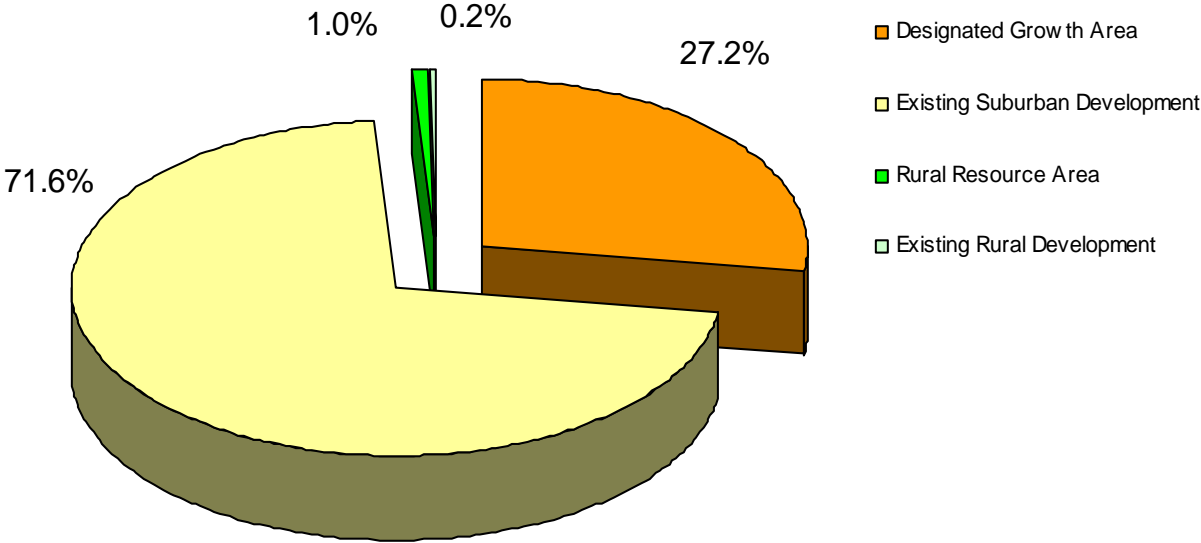


**County Growth and Preservation Plan**

All but 21 of the housing units proposed in the county were located in designated growth areas or existing developed areas (99%). The County Comprehensive Plan recommends that no more than 5% of new housing units should be located in rural resource areas. In 2011, only 1% of housing units proposed were located within rural resource areas. It would be hard to do any better than these measures, although the recent economic climate helps to keep these numbers down. With a stifled market for new single family detached homes, there is less pressure for development of larger proposals in outlying areas or other greenfields.

The County Comprehensive Plan also recommends that residential developments maintain a housing density of greater than one unit per acre in developed suburban areas and designated growth areas of the county. In 2011, over 95% of all units proposed in designated growth areas and developed suburban areas were proposed at densities greater than one housing unit per acre. The density of all new units proposed in designated growth areas was 3.8 units per acre and the density in developed suburban areas was 11.2 units per acre. The density in rural resource areas was 0.2 units per acre. Overall, the density of all newly proposed development in 2011 was 3.4 units per acre.

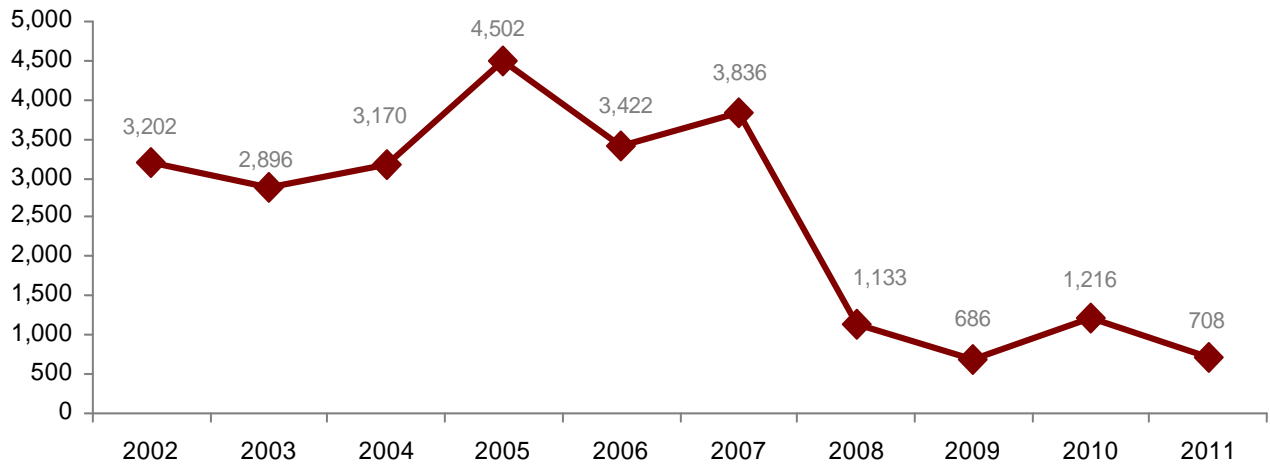
**Location of 2011 Proposed Residential Units Relative to the County Growth and Preservation Plan**



**Approved Units**

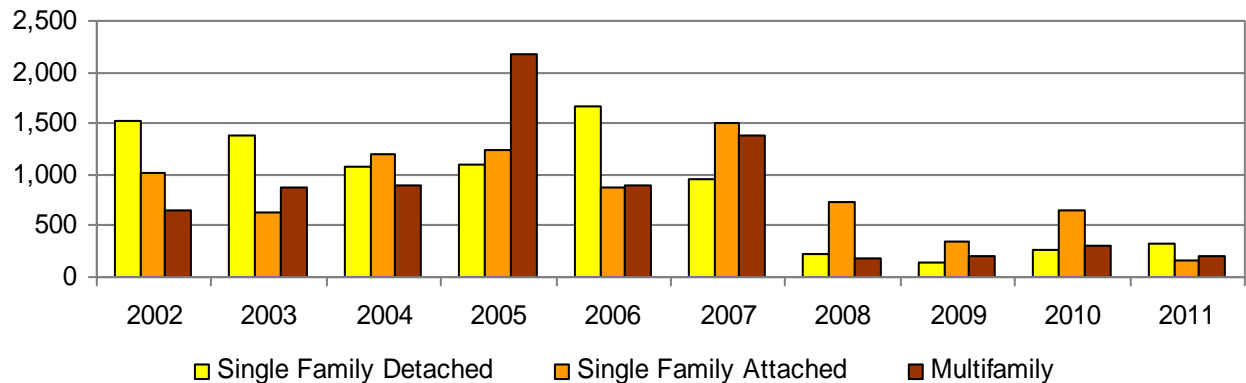
In 2011, there were a total of 708 residential units approved for construction. This is a 42% drop from the 2010 total. Figures from the last four years pale in comparison to annual approvals over the rest of the decade. If the housing market continues to improve off of the increase in proposals this year, we expect to see approvals to also increase gradually. There are also still projects in the pipeline that may have been proposed years ago but were suspended or abandoned due to the market downturn. Approvals could also increase if some of these projects are revisited or sold to another developer.

**Approved Residential Housing Units, 2002 - 2011**

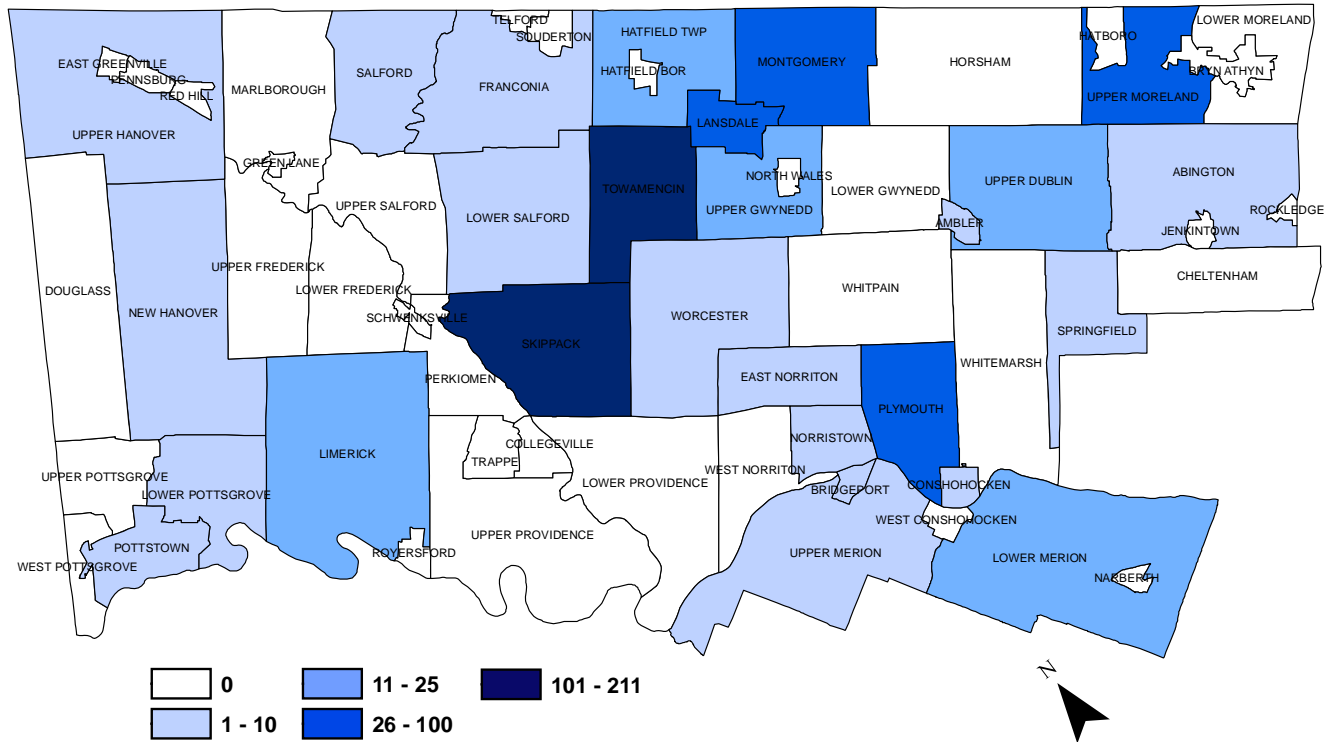


Single family detached units were approved in the greatest numbers compared to the other housing types for the first time since 2006. However, it is difficult to say that this fact is indicative of any new trend since all three categories have been at a historically low level for most of that time. In comparison to single family detached homes, there have been greater numbers of attached and multifamily proposals, but it is generally easier to obtain approval for single family detached developments due to a lesser concentration of issues. 211 of the approved units were age-restricted, accounting for 30% of all units.

**Approved Residential Units by Type, 2002-2011**



**Residential Units Approved by Municipality, 2011**



**Conclusion**

In 2011, residential land development proposals rebounded significantly from 2010, and showed that developer interest may finally assist in recovering from the housing slump of the last five years. Almost 2,000 new units were proposed. Multifamily unit proposals drove the increase. The two largest proposals were both apartment/condominium projects along the Schuylkill River Valley, but five other multifamily proposals also made the top ten. Age-restricted housing still received a fair number of proposals but fell as a percentage of total residential activity.

The increased number of units proposed does not guarantee that the county has actually recovered from the housing slump. Proposed projects do not always get built or even approved, and in 2011, approvals were still close to a record low with only 708 units approved. Hopefully, an increase in proposals combined with new life in older projects that had been stalled due to the economy, will gradually increase development approvals and construction in the years to come.

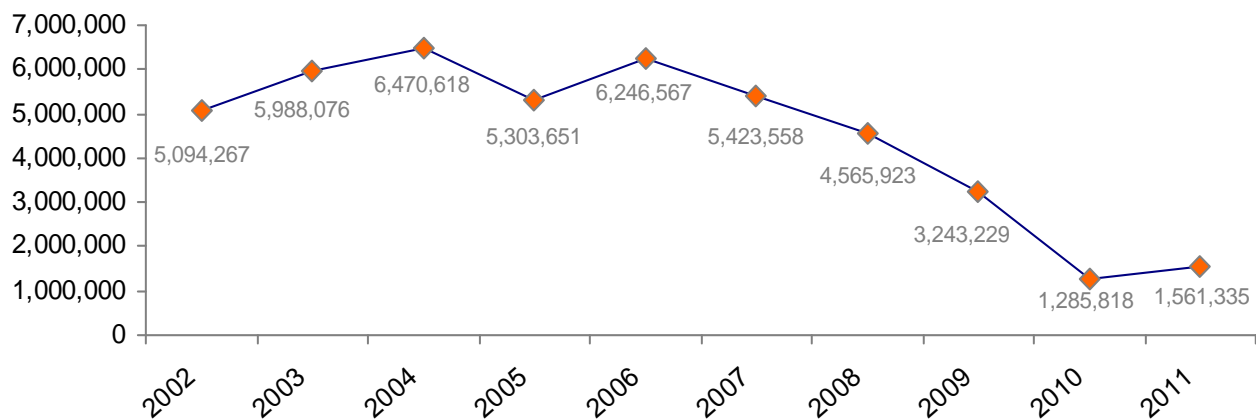
## Section Four Nonresidential Submissions

### Proposed Nonresidential Development

Nonresidential development includes retail commercial, office, industrial, and institutional uses. The institutional category includes hospitals, schools, skilled nursing facilities, and churches. Independent living units within continuing care facilities are not included in these totals, but are counted as residential units instead. A single continuing care facility can have any number of detached, attached, or multifamily units. If the facility includes an assisted living and common area, the square footage of that building and an estimate of the land area is included in our summation of institutional land development. Municipal land uses have their own separate land use category and are not included in institutional land use.

In 2011, the amount of nonresidential square feet proposed for development increased by 21% compared to 2010. The total, 1.56 million square feet, reverses a tide of four consecutive years of declining nonresidential proposals based on square footage. However, it is still the second lowest total since records for nonresidential square footage began being compiled in 1988. Prior to 2008, the total square footage of nonresidential development proposed had not dipped below 5 million square feet since at least 1996.

**Proposed Nonresidential Square Footage, 2002 to 2011**



### Nonresidential Proposals by Type

Commercial development proposals improved by 79% in 2011 to become the most active nonresidential category during the year. However, it still fell short of most prior years. The average amount of commercial space proposed during the last ten years was over 1.6 million square feet per year. The largest new commercial proposal in 2011 was for a renovation of the Valley Forge Shopping Center featuring a 150,000+ square foot Target store in Upper Merion Township.

Industrial square footage proposals improved to over 300,000 square feet after an almost nonexistent showing the year before. A new warehouse facility in Hatfield Township was the largest proposal at 90,000 square feet. Expansion to a parts manufacturing company in the Linfield Corporate Center in Limerick Township and a sealant manufacturer in Towamencin Township were the next two largest proposals.

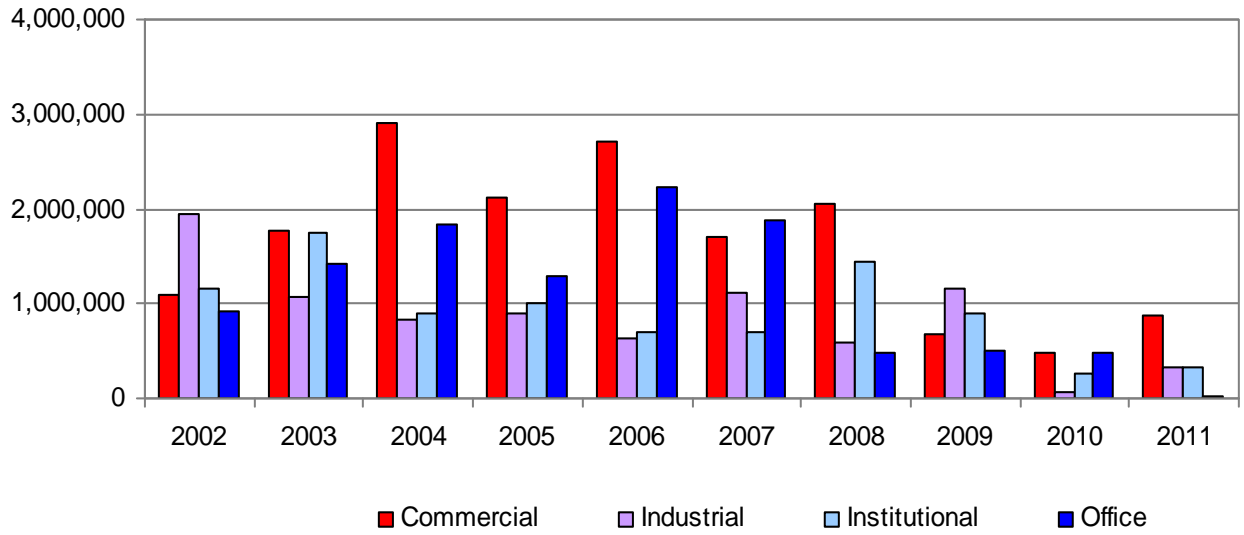
### Proposed Development of Nonresidential Square Footage, 2010 - 2011

Type	2011	2010	Change
Commercial	865,362	483,394	79%
Industrial	336,805	64,418	423%
Institutional	331,742	266,196	25%
Office	27,426	471,810	-94%
<b>Total</b>	<b>1,561,335</b>	<b>1,285,818</b>	<b>21%</b>

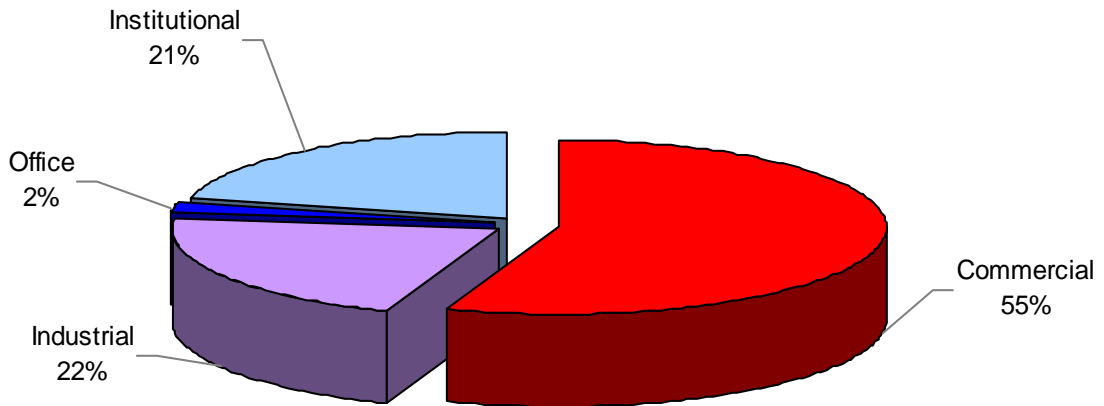
Institutional proposals increased 25% from 2010. This category tends to swing more wildly than the others from year to year due to the impact of large school, church, or health care-related proposals that come and go, but in 2011, it was the most consistent category from the year before. There were no proposed institutional developments with more than 100,000 square feet. The two largest proposals were a new elementary school in Cheltenham Township and a continuing care facility at Lewis Square in Limerick Township. Lewis Square is truly a mixed-use development. In addition to the nursing home and common areas counted in the institutional category, it also features 234 independent living units (which are counted as residential development) and retail commercial uses on the same tract.

Office proposals were the only nonresidential category to decrease from 2010. In fact, there were just five total proposals with only two of them at just over 10,000 square feet. An expansion to a dental laboratory in Upper Gwynedd Township and a small office expansion at the Village Crossing in Blue Bell were the largest proposals. Office proposals had been averaging close to 500,000 square feet over the previous three years and well over a million square feet before that. The economy has kept new development proposals down, but it only takes a couple of middle-to-large size companies to really turn those numbers around.

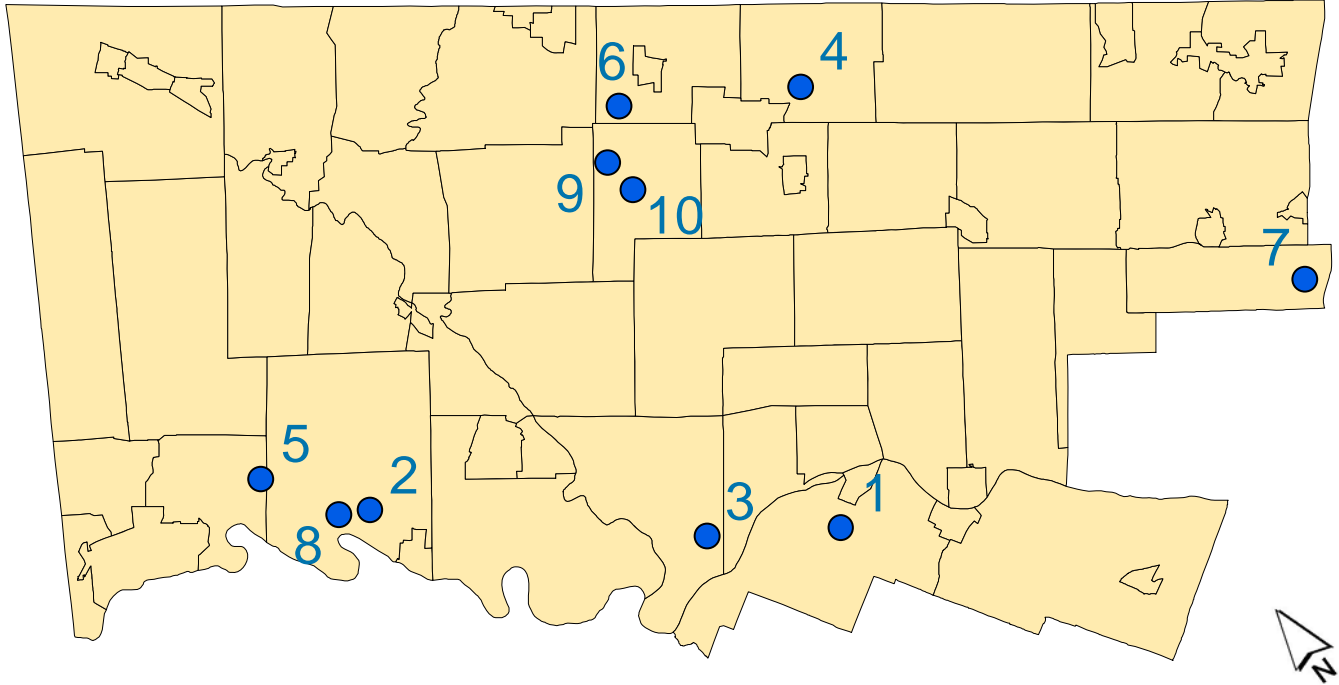
**Proposed Nonresidential Square Feet by Development Type, 2002 - 2011**



**Proposed Nonresidential Square Footage, 2011**



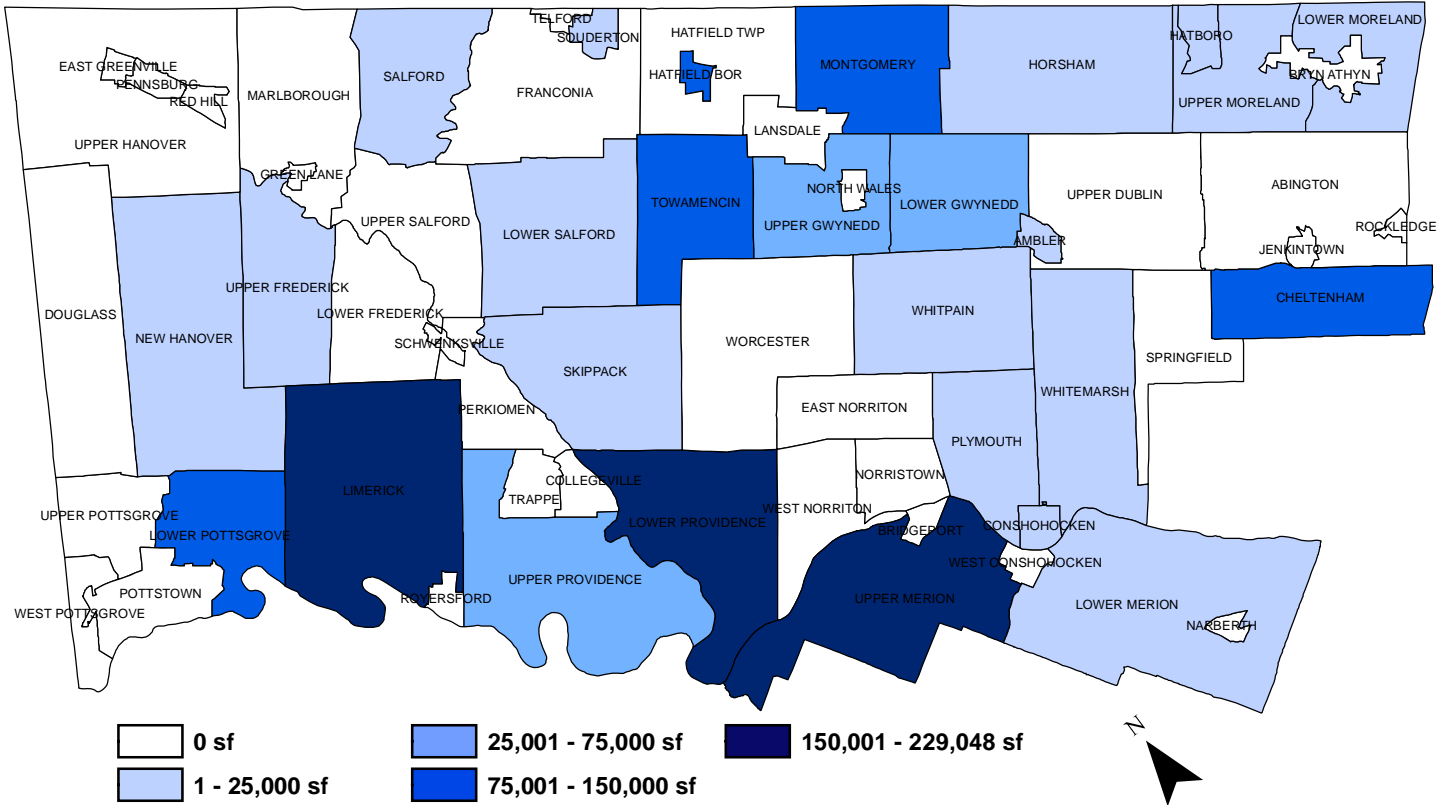
**Location of Top Ten Largest Nonresidential Proposals, 2011**



**Montgomery County Largest Nonresidential Proposals, 2011**

Development Name	Square Feet	Type	Municipality
1. Valley Forge Shopping Center - Target	178,415	Commercial	Upper Merion
2. Lewis Square - Senior Living & Mixed Use	159,000	Commercial / Institutional	Limerick
3. 950 Rittenhouse Road Mixed Use - Hotel, Retail, and Residential	153,262	Commercial	Lower Providence
4. Montgomery Mall Expansion (Wegmans)	140,000	Commercial	Montgomery
5. Sanatoga Marketplace	110,439	Commercial	Lower Pottsgrove
6. Ruth Business Center	90,000	Industrial	Hatfield Township
7. Cheltenham Elementary School	88,843	Institutional	Cheltenham
8. Linfield Corporate Center Lot #53	70,000	Industrial	Limerick
9. Greene, Tweed & Company	66,501	Industrial	Towamencin
10. Colcor Limited Partnership - Hotel	57,626	Commercial	Towamencin

**Proposed Nonresidential Square Footage by Municipality, 2011**



**Nonresidential Square Footage Proposed for Development by Municipality**

The table on the following page lists nonresidential square footage totals by type for each municipality. Limerick Township received the most square feet in proposals while Upper Merion, Lower Providence, and Montgomery Townships followed with about 150,000 - 200,000 square feet proposed in each municipality.

The countywide map above shows that nonresidential development proposals really stood out in two areas in 2011. The Route 422 corridor has been a strong performer as more nonresidential markets open up to serve the booming population growth from Upper Merion to Pottstown. Development proposals were also clustered in the North Penn Region around Lansdale.



**Section Four: Nonresidential Submissions**

**Proposed Nonresidential Square Footage by Municipality, 2011**

Municipality	Total	Commercial	Industrial	Institutional*	Office
Abington	0	0	0	0	0
Ambler	21,360	16,860	4,500	0	0
Bridgeport	0	0	0	0	0
Bryn Athyn	0	0	0	0	0
Cheltenham	91,578	2,735	0	88,843	0
Collegeville	0	0	0	0	0
Conshohocken	7,636	940	0	6,696	0
Douglass	0	0	0	0	0
East Greenville	0	0	0	0	0
East Norriton	0	0	0	0	0
Franconia	0	0	0	0	0
Green Lane	0	0	0	0	0
Hatboro	8,000	0	8,000	0	0
Hatfield Borough	137,956	4,085	90,000	43,871	0
Hatfield Township	0	0	0	0	0
Horsham	657	144	0	513	0
Jenkintown	0	0	0	0	0
Lansdale	0	0	0	0	0
Limerick	229,048	72,000	70,048	87,000	0
Lower Frederick	0	0	0	0	0
Lower Gwynedd	52,596	0	0	52,596	0
Lower Merion	16,927	16,927	0	0	0
Lower Moreland	19,024	0	19,024	0	0
Lower Pottsgrove	124,239	113,279	0	10,960	0
Lower Providence	168,294	153,262	15,032	0	0
Lower Salford	13,830	0	0	9,910	3,920
Marlborough	0	0	0	0	0
Montgomery	149,600	140,000	9,600	0	0
Narberth	0	0	0	0	0
New Hanover	21,000	21,000	0	0	0
Norristown	0	0	0	0	0

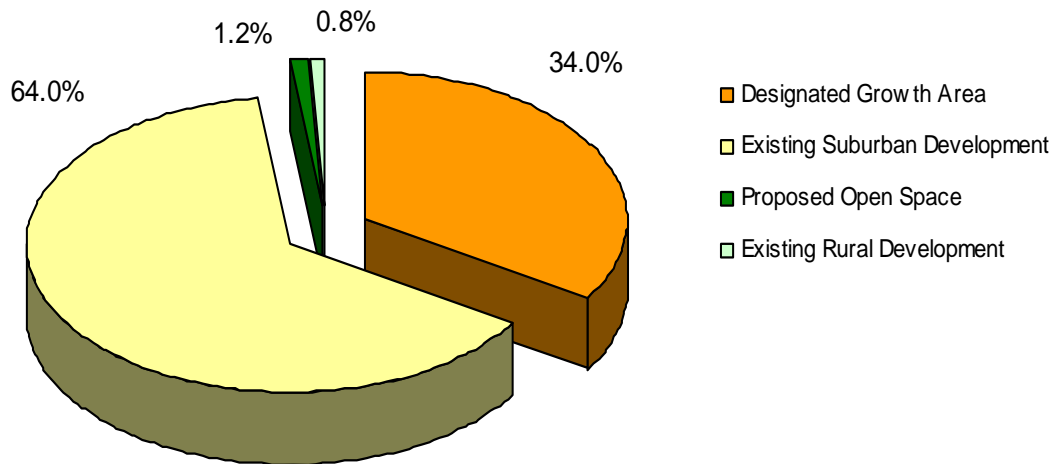
Municipality	Total	Commercial	Industrial	Institutional*	Office
North Wales	0	0	0	0	0
Pennsburg	0	0	0	0	0
Perkiomen	0	0	0	0	0
Plymouth	15,130	4,530	10,600	0	0
Pottstown	0	0	0	0	0
Red Hill	0	0	0	0	0
Rockledge	0	0	0	0	0
Royersford	0	0	0	0	0
Salford	2,291	0	0	2,291	0
Schwenksville	0	0	0	0	0
Skippack	23,045	10,750	12,295	0	0
Souderton	11,675	2,125	0	9,550	0
Springfield	0	0	0	0	0
Telford	0	0	0	0	0
Towamencin	124,127	57,626	66,501	0	0
Trappe	0	0	0	0	0
Upper Dublin	0	0	0	0	0
Upper Frederick	19,212	0	0	19,212	0
Upper Gwynedd	41,524	0	31,205	0	10,319
Upper Hanover	0	0	0	0	0
Upper Merion	196,062	196,062	0	0	0
Upper Moreland	12,607	9,437	0	0	3,170
Upper Pottsgrove	0	0	0	0	0
Upper Providence	41,100	41,100	0	0	0
Upper Salford	0	0	0	0	0
West Conshohocken	0	0	0	0	0
West Norriton	0	0	0	0	0
West Pottsgrove	0	0	0	0	0
Whitemarsh	2,500	2,500	0	0	0
Whitpain	10,017	0	0	0	10,017
Worcester	0	0	0	0	0
<b>Totals</b>	<b>1,561,335</b>	<b>865,362</b>	<b>336,805</b>	<b>331,442</b>	<b>27,426</b>

\*Includes institutional and elderly institutional proposals.

**County Growth and Preservation Plan**

The County Comprehensive Plan recommends that new nonresidential development be located mostly in existing developed areas and designated growth areas. In 2011, all but about 20,000 square feet of proposed nonresidential development was located in these areas (99%). Almost two-thirds of nonresidential development proposals were located in existing suburban developed areas with another third found in designated growth areas. There was very little nonresidential square footage proposed in rural resource areas or proposed open space areas with the exception of a 19,000 square foot proposed expansion to an existing church in Upper Frederick Township.

**Location of 2011 Proposed Nonresidential Square Footage Relative to the County Growth and Preservation Plan**

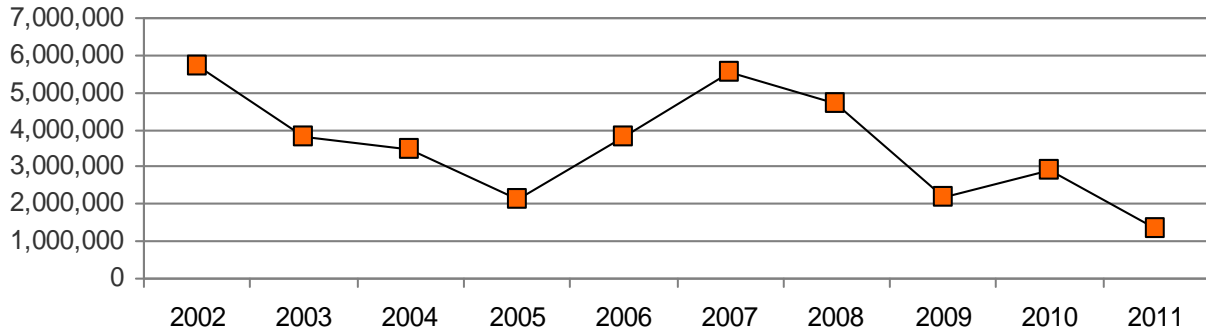


**Approved Nonresidential Development**

In 2011, under 1.4 million square feet of nonresidential development were approved with final plans recorded. This was less than half of the 2010 total, and it was the lowest total since at least 1995, when comparable records began being recorded. Annual approvals, especially for nonresidential categories, can vary widely year to year based on the impact of only a few major development submissions, but the decrease in approvals over the last few years is consistent with recent drops in proposals.

The square footage approved for commercial and institutional development declined the most from the previous year, but office development approvals actually increased by 16%. The office surge was largely due to almost 500,000 square feet of redeveloped office space at the Arborcrest Corporate Campus in Whitpain Township. There were no other new nonresidential approvals totaling more than 100,000 square feet.

**Nonresidential Development Approved, 2002 - 2011**

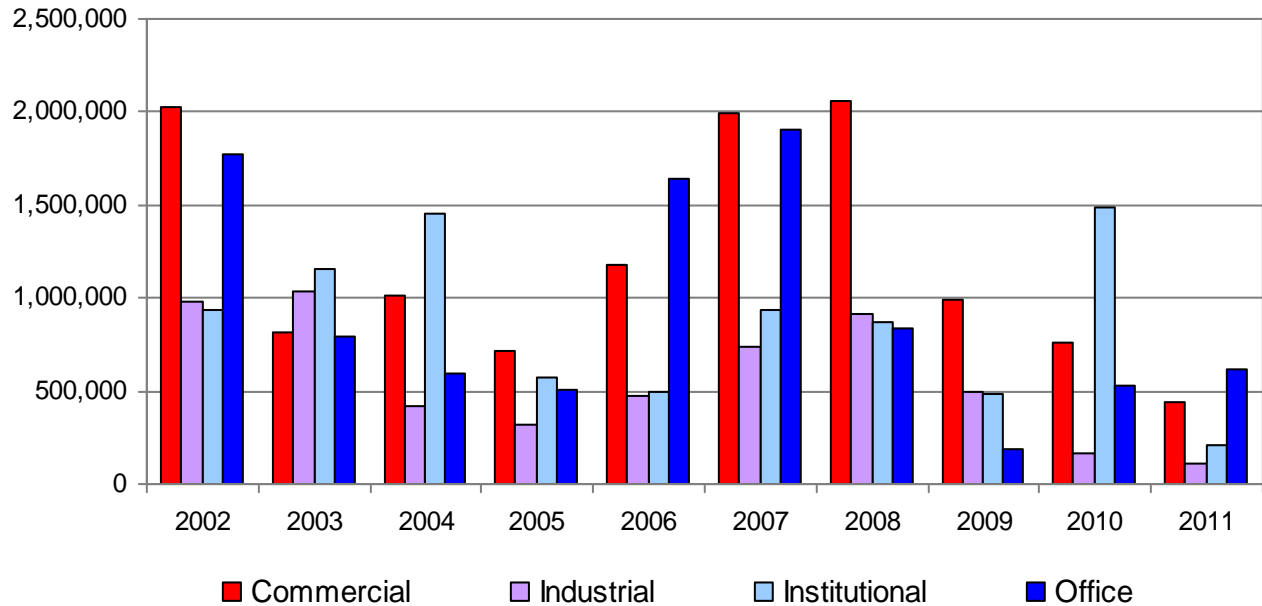


Year	Total Square Feet Approved
2002	5,719,086
2003	3,806,059
2004	3,488,357
2005	2,122,773
2006	3,795,560
2007	5,570,145
2008	4,685,520
2009	2,159,522
2010	2,570,669
2011	1,368,996
<b>Total</b>	<b>35,653,227</b>

**Approved Development of Nonresidential Square Footage by Type, 2010 - 2011**

Type	2011	2010	Change
Commercial	439,197	755,345	-42%
Industrial	108,002	166,304	-35%
Institutional	204,478	1,118,975	-86%
Office	617,319	530,045	16%

Approved Nonresidential Square Footage by Type, 2002-2011



**Conclusion**

Proposed nonresidential square footage improved for the first time after four years of decline. However, it was still only the second lowest annual total since county records began in 1988. Commercial, industrial, and institutional land use categories all increased from the previous year, but only a few small office proposals were submitted. Geographically, the Route 422 corridor remained a strong area for nonresidential development with a number of the largest proposals found along the high-growth area of the Schuylkill River Valley. The North Penn Region was also a popular location for new nonresidential proposals, while major projects were absent from most of the remaining county area. Almost all nonresidential activity (99%) was located within designated growth areas or existing developed areas based on the County Comprehensive Plan.

Approved nonresidential development decreased by 53% from 2010 to 2011. The decline was felt in all categories except for office, which grew based on one large approved plan. Similarly to the residential segment, an increase in proposals could help to bring more approved projects in the next few years.

## Section Five

### Zoning Activity

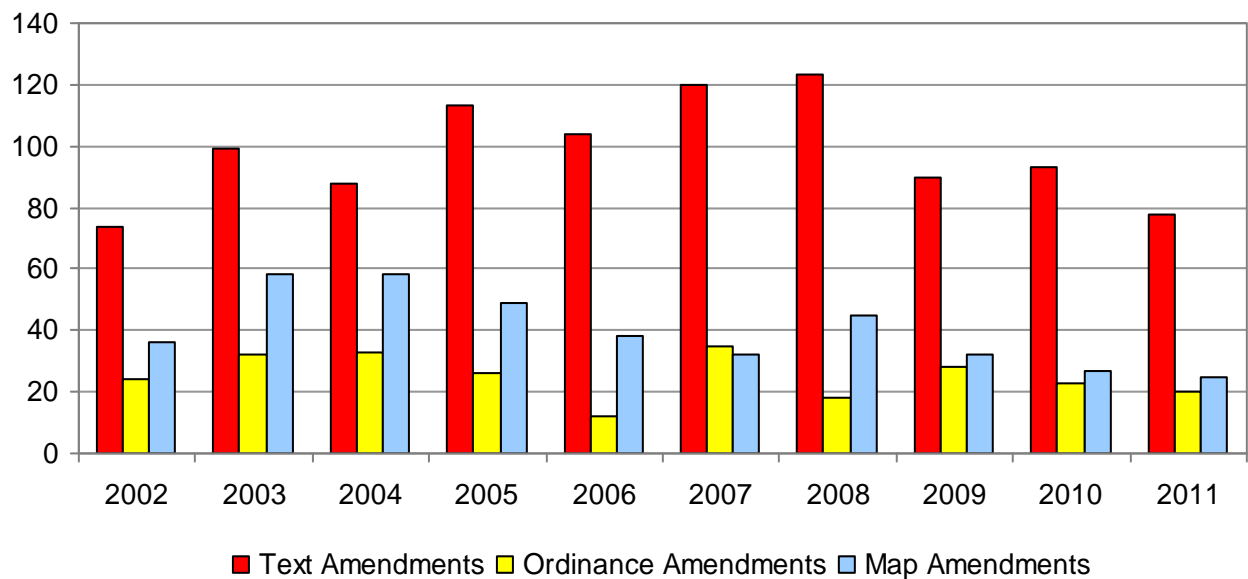
#### Zoning Amendments

All 62 municipalities in the county have officially adopted zoning ordinances, including zoning maps. In accordance with the Municipalities Planning Code (MPC), each township and borough is required to submit all proposed zoning ordinance or map amendments to the county Planning Commission for review. These amendments can be minor, involving small changes to the text of the zoning code, or major comprehensive amendments to the entire zoning ordinance.

The Planning Commission received 123 proposed amendments to local zoning code ordinances and zoning maps. This was slightly less than the total from last year (143), and below the ten year average of 163.

In 2011, 20 zoning amendments were proposed to change significant portions of an entire ordinance, 78 involved less significant changes to a single district, and 25 involved map changes. Lower Merion and Lower Providence Townships had the most amendments of all municipalities with 9 each.

#### Montgomery County Proposed Zoning Amendments: 2002 - 2011



**Section Five: Zoning Activity**

**Zoning Activity by Municipality, 2011**

Municipality	Total	Map Amend.	Ordinance Amend.	Minor Text Amend.
Abington	2	2	0	0
Ambler	0	0	0	0
Bridgeport	0	0	0	0
Bryn Athyn	0	0	0	0
Cheltenham	2	0	0	2
Collegeville	1	0	1	0
Conshohocken	0	0	0	0
Douglass	1	0	0	1
East Greenville	1	0	1	0
East Norriton	0	0	0	0
Franconia	1	0	0	1
Green Lane	0	0	0	0
Hatboro	1	0	1	0
Hatfield Borough	1	0	0	1
Hatfield Township	1	0	0	1
Horsham	2	1	1	0
Jenkintown	1	0	1	0
Lansdale	3	2	1	0
Limerick	8	0	1	7
Lower Frederick	1	0	0	1
Lower Gwynedd	6	2	3	1
Lower Merion	9	2	0	7
Lower Moreland	5	0	0	5
Lower Pottsgrove	0	0	0	0
Lower Providence	9	1	0	8
Lower Salford	3	0	1	2
Marlborough	2	0	0	2
Montgomery	2	0	0	2
Narberth	0	0	0	0
New Hanover	0	0	0	0
Norristown	1	0	0	1

Municipality	Total	Map Amend.	Ordinance Amend.	Minor Text Amend.
North Wales	1	0	0	1
Pennsburg	0	0	0	0
Perkiomen	0	0	0	0
Plymouth	6	1	1	4
Pottstown	2	1	1	0
Red Hill	0	0	0	0
Rockledge	0	0	0	0
Royersford	2	2	0	0
Salford	0	0	0	0
Schwenksville	0	0	0	0
Skippack	2	1	0	1
Souderton	0	0	0	0
Springfield	3	0	1	2
Telford	0	0	0	0
Towamencin	6	1	1	4
Trappe	0	0	0	0
Upper Dublin	8	2	1	5
Upper Frederick	4	1	1	2
Upper Gwynedd	1	1	0	0
Upper Hanover	0	0	0	0
Upper Merion	1	0	0	1
Upper Moreland	4	1	1	2
Upper Pottsgrove	3	1	0	2
Upper Providence	1	0	0	1
Upper Salford	0	0	0	0
West Conshohocken	3	1	0	2
West Norriton	0	0	0	0
West Pottsgrove	1	0	0	1
Whitemarsh	5	1	0	4
Whitpain	5	1	1	3
Worcester	2	0	1	1
<b>Total</b>	<b>123</b>	<b>25</b>	<b>20</b>	<b>78</b>

